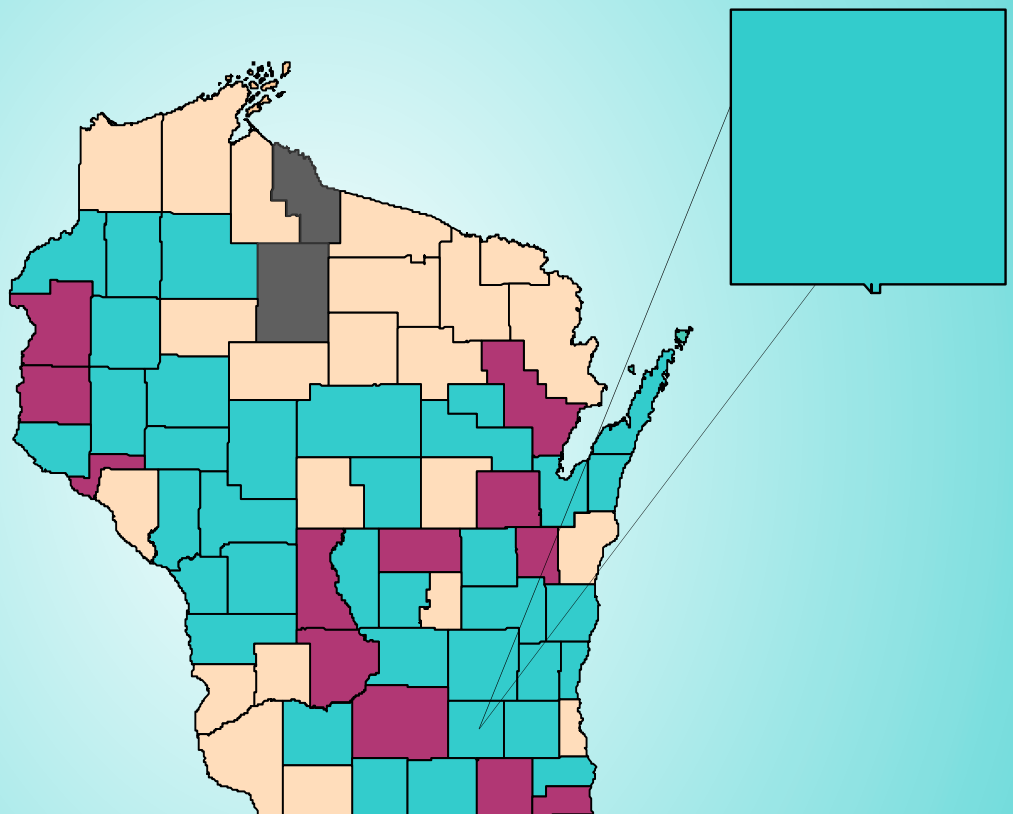


# Jefferson County Workforce Profile

Projected population growth from 2000 to 2020



Source: Wisconsin Department of Administration, Demographic Services Center.  
Statewide population growth is projected to be 13.9 percent from 2000 to 2020.



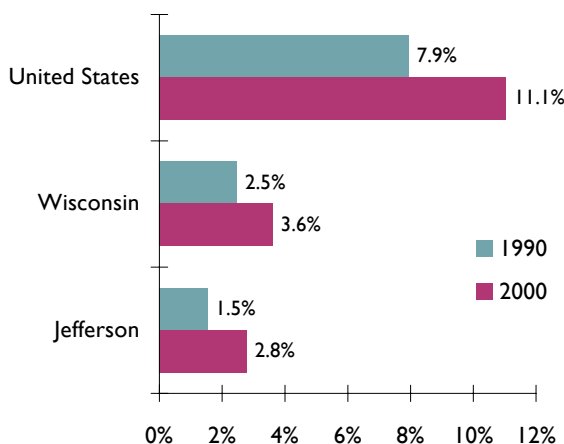
## County Population

Population trends affect the supply of workers, the ability to attract employers and the demand for goods and services. Jefferson County added about 1,522 people, or 2.0 percent to its population between the April 2000 Census and the January 2002 population estimate. This growth rate was above the statewide population growth rate and roughly equaled the national rate. About 46% of the growth occurred in Fort Atkinson and the Jefferson County portion of the City of Watertown.

Compared to the rest of non-metropolitan Wisconsin, Jefferson County's population growth was a bit less reliant on net migration (people moving in minus people moving out) and enjoyed a bit more natural growth (births minus deaths). People moving in to Jefferson County are three times as likely to be from another Wisconsin county as from another state, so metropolitan population trends may seep into Jefferson County from the metropolitan areas to the east and west.

The graph below shows how many residents were foreign-born in the 1990 and 2000 censuses. Eventually, Jefferson County may catch up to the statewide average, but the county seems unlikely to approach national averages any time soon. Compared to their statewide and national counterparts, foreign-born residents in Jefferson County are more likely to have arrived after 1990 and less likely to have arrived between 1980 and 1989.

**Share of Foreign-born Residents**



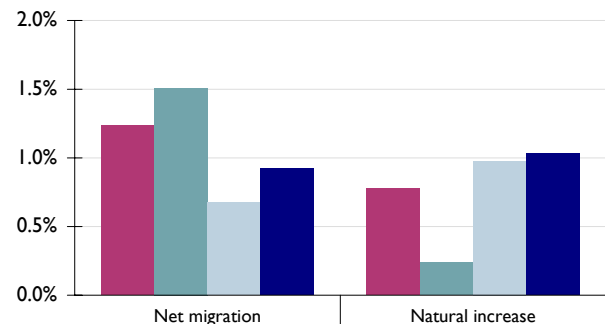
Source: US Dept. of Commerce, Census 2000, Summary file-4, QT-P14

**Total Population**

	April 2000 Census	January 1, 2002 estimate	Percent change
<b>United States</b>	281,421,906	286,923,000	2.0%
<b>Wisconsin</b>	5,363,701	5,453,896	1.7%
<b>Jefferson County</b>	75,784	77,306	2.0%
<b>Largest Municipalities</b>			
Watertown, City*	13,535	13,992	3.4%
Fort Atkinson, City	11,621	11,859	2.0%
Jefferson, City	7,208	7,315	1.5%
Lake Mills, City	4,843	4,902	1.2%
Koshkonong, Town	3,395	3,460	1.9%
Waterloo, City	3,259	3,286	0.8%
Oakland, Town	3,135	3,216	2.6%
Ixonia, Town	2,902	3,032	4.5%
Whitewater, City*	2,628	2,695	2.5%
Jefferson, Town	2,395	2,382	-0.5%

\* Jefferson County portion only

**Net migration and natural increase**



Source: Wisconsin DOA, Demographic Services Center & US Census Bureau

The county experienced fewer births from 1992 to 2001 than it had between 1982 and 1991. In 2001, 61 percent of Jefferson County's births were to mothers under 30 years old and 87 percent were to mothers under 35. Natural increase (or lack thereof) affects population growth; and age demographics, in turn, have an impact on natural increase. The number of female residents in their 20s and 30s affects future birth rates and population growth rates.

# Jefferson County Workforce Profile

## Population Projections by Age Groups in Jefferson County

	0-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
<b>2000</b>																
Male	2,411	2,568	2,813	3,261	2,537	2,387	2,719	3,168	3,096	2,853	2,401	1,849	1,517	1,158	1,035	1,737
Female	2,284	2,454	2,740	3,321	2,336	2,301	2,635	3,150	3,043	2,787	2,388	1,853	1,553	1,286	1,273	2,870
<b>2005</b>																
Male	2,484	2,598	2,783	3,053	2,820	2,655	2,500	2,888	3,251	3,118	2,810	2,312	1,712	1,362	972	1,827
Female	2,378	2,463	2,666	3,040	2,875	2,531	2,421	2,776	3,226	3,080	2,747	2,327	1,791	1,452	1,190	2,922
<b>2010</b>																
Male	2,587	2,633	2,764	3,018	2,633	2,942	2,782	2,664	2,969	3,275	3,069	2,705	2,143	1,540	1,147	1,840
Female	2,478	2,525	2,627	2,945	2,623	3,086	2,663	2,557	2,847	3,264	3,028	2,670	2,244	1,670	1,342	2,881
<b>2015</b>																
Male	2,749	2,716	2,793	2,968	2,596	2,747	3,061	2,958	2,736	2,988	3,219	2,951	2,507	1,929	1,300	2,001
Female	2,633	2,607	2,688	2,866	2,531	2,810	3,214	2,804	2,618	2,875	3,199	2,935	2,569	2,088	1,542	2,980
<b>2020</b>																
Male	2,885	2,866	2,883	2,998	2,556	2,711	2,857	3,242	3,042	2,760	2,942	3,102	2,743	2,266	1,637	2,259
Female	2,762	2,753	2,777	2,926	2,464	2,717	2,924	3,368	2,874	2,648	2,820	3,104	2,829	2,396	1,935	3,256

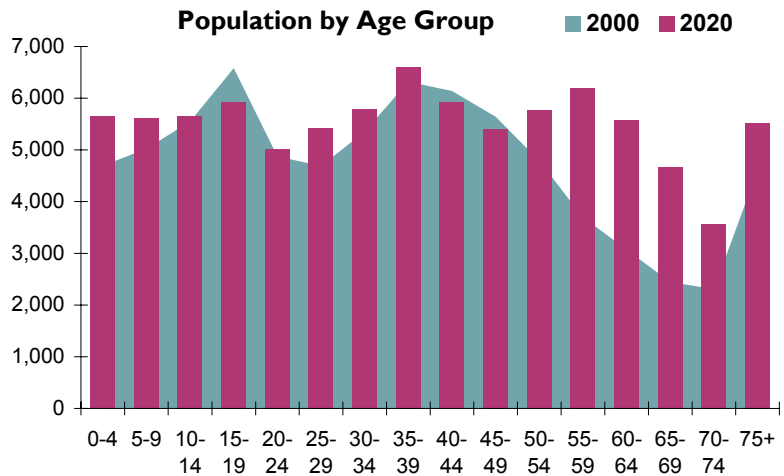
Source: Wisconsin Dept. of Administration, Demographic Services, October 2003

Population projections suggest that, between 2000 and 2020, Jefferson County will grow by something like 12,518 people, or nearly 17 percent. The 60- to 69-year-old age groups will grow by roughly 4,720 people or nearly 86 percent. Meanwhile, the ranks of the 40- to 49-year-old age groups will thin by approximately 455 or 3.9 percent and the 10- to 19-year-old cohort will shrink 658 or 10.0 percent.

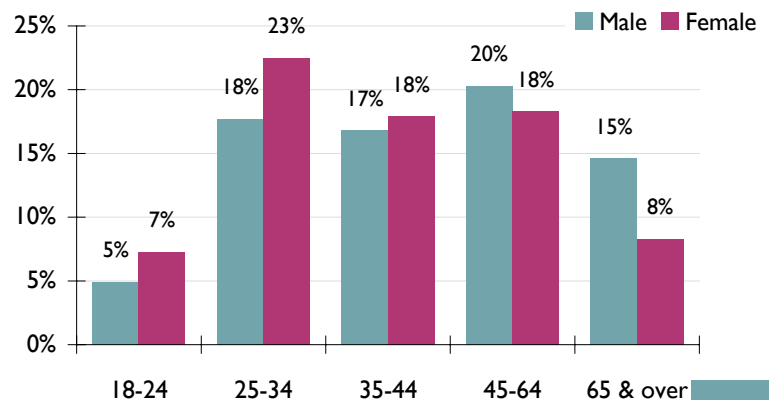
Among Jefferson County men, the Bachelor's degree is more common among 45- to 54-year olds than among 25- to 44-year-olds. In younger age cohorts, the county's women outpace its men by this measure, and the gap appears to be growing.

Academic opportunities in Whitewater, Madison and the Milwaukee-Waukesha area help a greater share of Jefferson County's young people remain in or near the county, so it retains more young people than the typical non-metropolitan county. The group containing 2,740 females aged 10 to 14 years in 2000 dips to 2,623 females aged 20 to 24 in 2010 and bounces back to 2,924 females aged 30 to 34 in 2020.

In 2001, roughly 57 percent of the county's births were to women between 25 and 34 years old, and 30 percent to women with college degrees, compared to 53 percent and 22 percent for non-metropolitan Wisconsin as a whole.



## Percent of age group with at least a Bachelor's degree in Jefferson County



Source: US Dept. of Commerce, Census 2000, Summary file 4, QT-P20

## Labor Force Characteristics

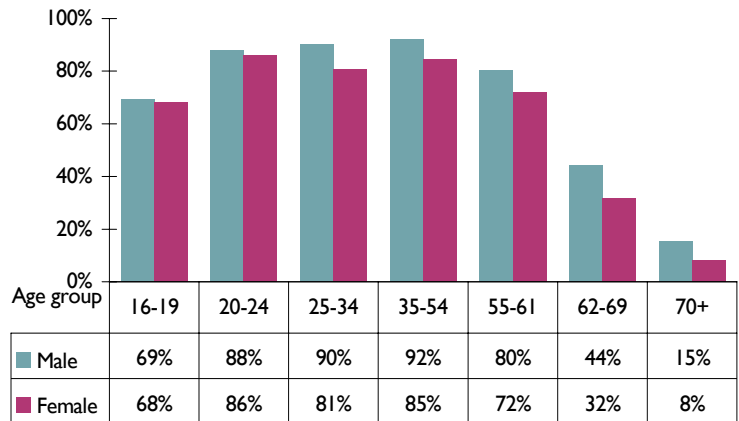
The labor force participation rate is the proportion of the eligible population that either works or looks for work. The top right graph shows that labor force participation tends to be higher among 25- to 54-year-olds than among older or younger cohorts. Available data do not specify this, but it appears likely that at least some of the county's women are working through college, leaving the labor force during the 25 to 34 age range and returning later. In 2001, roughly 21 percent of Jefferson County's births were to mothers aged 20 to 24, the same group that showed the highest female labor force participation rate in the 2000 Census.

Population trends on page 2 cast a different light on labor force participation trends shown in the upper right graph. Large numbers of people will move from age groups with high labor force participation (35 to 54 years old) into age groups where labor force participation falls considerably. Despite the high participation rates of 35- to 44-year-olds, there will be fewer of them in the labor force in 2020 than there were in 2000; similarly, the swelling number of 55- to 64-year-olds will overcome lower participation rates in that age group to increase their overall labor force numbers. (See lower right graph.)

In recent years, Wisconsin's labor force participation rates have been among the five highest in the nation. Rates in Jefferson County have been similarly high. Demographic shifts will make such high rates unlikely in the future. In decades past, employers relied on rising female labor force participation to replace workers leaving the labor force. Today, female participation rates don't appear likely to increase much among younger age groups. (See graph at upper right.) Together, these trends prompt employers to ask where they will find workers to replace those who retire in the near future.

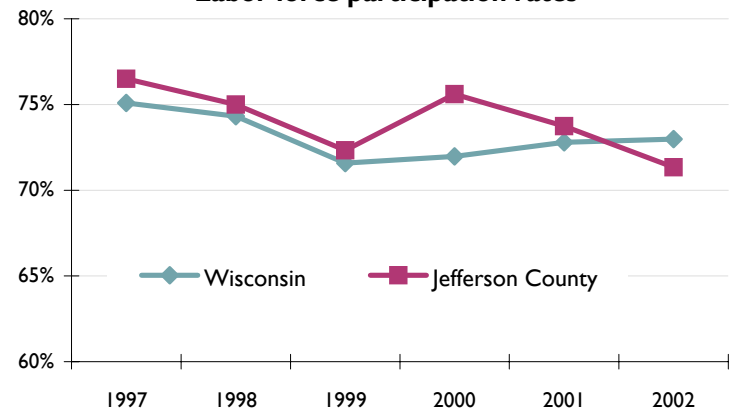
When leaving the labor force older residents often increase demand for certain types of labor, such as health care or home-related services. Competition for the younger workers who often fill these jobs will probably intensify. Employers who need to hold on to older workers or bring in more younger workers may have to modify compensation or workplace policies to fill vacancies.

**Jefferson Labor Force Participation by Age & Sex in 2000**



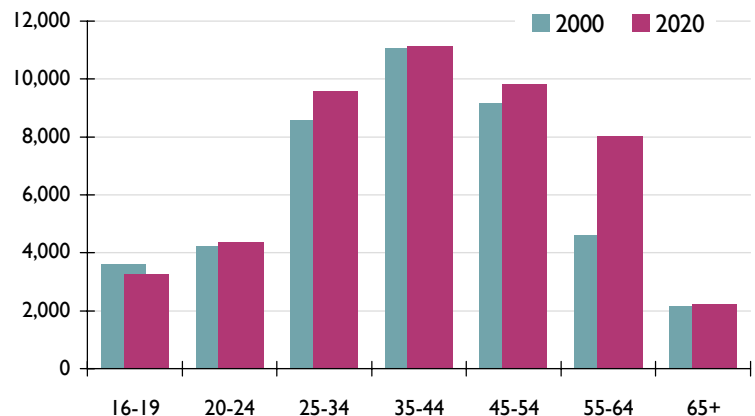
Source: US Dept. of Commerce, Census 2000, Summary file 4, PCT-79

**Labor force participation rates**



Source: WI DWD, Office of Economic Advisors, 2003

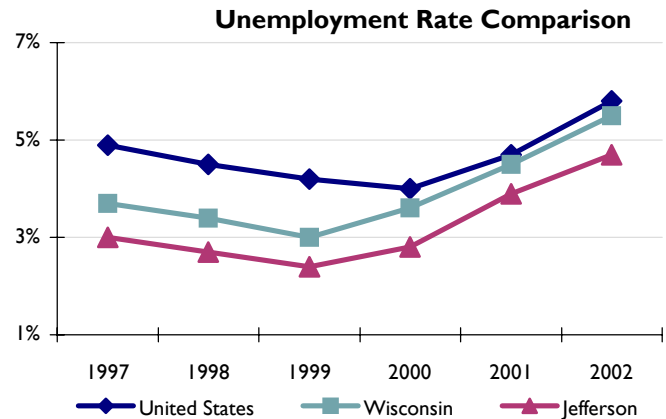
**Labor Force by Age in 2000 & 2020 in Jefferson County**



Source: DWD, Office of Economic Advisors, US Census, SF-4 (PCT-79), WI Demographic Services

## Jefferson County Workforce Profile

Over the course of 2002, an average of roughly 42,292 Jefferson County residents participated in labor force; about 40,293 were employed and approximately 1,999, or 4.7 percent, were unemployed. Although recent unemployment rates are not as high as peaks in 1991 and 1994, they are quite a contrast from the lows of the late 1990s. Despite encouraging national indicators, the local unemployment rate remained well above typical for each month of the first half of 2003 and had not shown signs of significant, sustained reduction by the time this profile was written.



### Jefferson County Civilian Labor Force Data

	1997	1998	1999	2000	2001	2002
Labor Force	42,196	41,897	41,343	43,277	43,266	42,292
Employed	40,911	40,747	40,344	42,082	41,591	40,293
Unemployed	1,285	1,150	999	1,195	1,675	1,999
Unemployment Rate	3.0%	2.7%	2.4%	2.8%	3.9%	4.7%

Source: WI DWD, Bureau of Workforce Information, LAUS program, 2003

## Occupations in demand

Jefferson County is part of Wisconsin's south central region. In its upper portion, the table to the right lists those occupations projected to experience the fastest proportional growth between 2000 and 2010. An occupation starting with few jobs doesn't need to add many to grow quickly. Altogether, the fastest-growing occupations accounted for 1.4 percent of the region's jobs in 2000 and are expected to account for 2.0 percent of the region's jobs in 2010, so it is not an exhaustive list of opportunities. The list does not support the notion that most jobs require a bachelor's degree.

In its lower portion, the table lists those occupations projected to generate the most openings between 2000 and 2010. The less training a job requires, the less likely an employer is to invest in retention incentives (such as wage or benefit increases). Nursing requires more training than the other occupations generating the most openings. Challenging work schedules and conditions contribute to turnover, yet nursing programs have long waiting lists. As many nurses and nursing instructors approach retirement, aging baby-boomers will increase demand.

### South Central Region Occupation Projections: 2010

	Top Ten Occupations	Education & Training Typically Required*	Average Wage**
Fastest Growth	Computer Soft Engrns Sysms Soft	Bachelor's degree	\$30.38
	Computer Support Specialists	Associate degree	\$20.03
	Computer Software Engrns Apps	Bachelor's degree	\$30.31
	Desktop Publishers	Postsecondary voc. trng	\$14.98
	Network Sysms/Data Comm Anal	Bachelor's degree	\$24.96
	Network/Computer Systems Admin	Bachelor's degree	\$25.79
	Medical Assts	1-12 mo. on-the-job training	\$12.75
	Medical Records/Health Info Techs	Associate degree	\$13.33
	Fitness Trainers/Aerobics Instruct	Postsecondary voc. trng	\$11.63
	Database Administrators	Bachelor's degree	\$25.64
Most Openings	Comb Food Prep/Serv Wrk/Incl Fast	1-month or less training	\$8.57
	Retail Salespersons	1-month or less training	\$10.09
	Cashiers	1-month or less training	\$7.81
	Waiters/Waitresses	1-month or less training	\$6.87
	Registered Nurses	Bachelor's degree	\$22.76
	Office Clerks/General	1-month or less training	\$11.78
	Labrs/Frght/Stock/Matrl Movers/Hand	1-month or less training	\$10.87
	Customer Service Reps	1-12 mo. on-the-job training	\$13.90
	Janitors/Cleanrs Ex Maids/Hskpng	1-month or less training	\$9.84
	Stock Clerks/Order Fillers	1-month or less training	\$10.40

\* The most common way to enter the occupation, not the only way

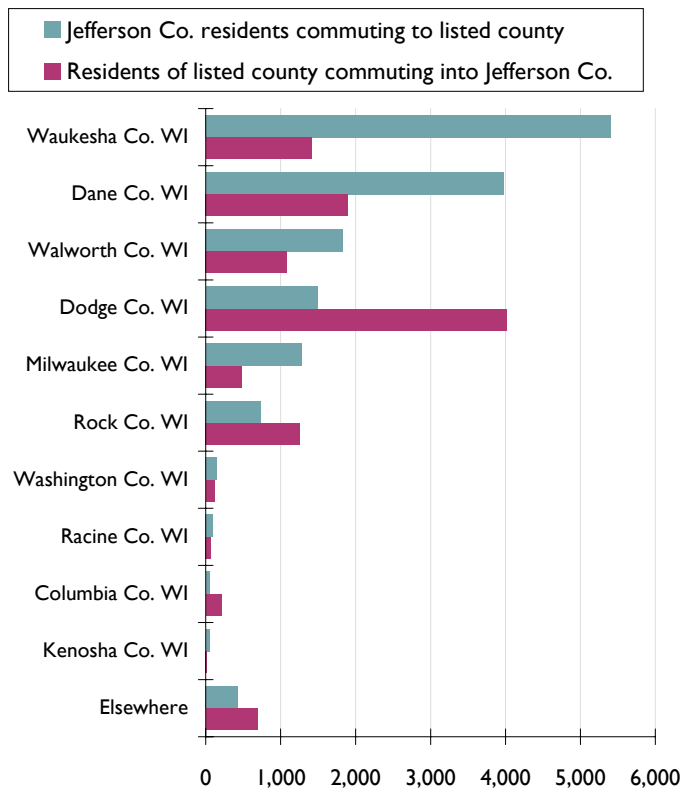
\*\* Wages from Occupation Employment Statistics survey responses for region, 2001

South Central WDA includes Columbia, Dane, Dodge, Jefferson, Marquette and Sauk counties.

Source: WI DWD, Bureau of Workforce Information, 2002

## County Commuting Patterns

In April 2003, the Census Bureau released county-to-county worker flow files, also known as county commuting patterns. Derived from those files, the chart and table below are dominated by Jefferson County residents commuting to Waukesha and Dane counties and Dodge County residents commuting to Jefferson County.



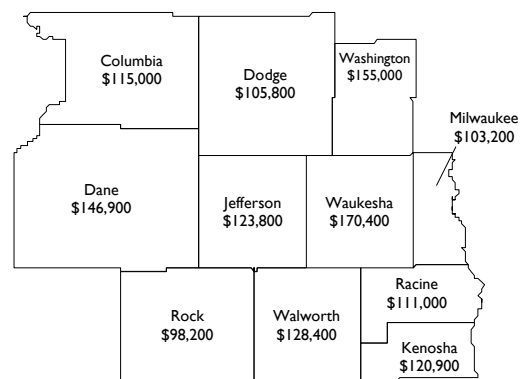
The 2000 Census reported that roughly 59 percent of working Jefferson County residents traveled less than 20 minutes to work and almost 74 percent traveled less than 30 minutes. Some workers can cross a county line without traveling a great distance. Whitewater and Watertown straddle the county's south and north borders, respectively. Highways connect both cities to I-94, the corridor running between Wisconsin's two largest metropolitan areas, which lie to the west and to the east.

Industry mix also plays a part in commuting patterns. Jefferson County is strong in retail, while Dodge County has a high concentration of manufacturing. Washington offers financial activities while Dane and Waukesha offer professional jobs. Higher wages and industry-specific jobs pull workers across borders.

Between the 2000 Census and the 2002 population estimate, roughly 61 percent of Jefferson County's population growth was net migration (people moving in minus people moving out). Roughly 73 percent of the people who moved in between 1995 and 2000 were from other Wisconsin counties. Available data does not specify which counties people move in from, but the map at the lower right of this page suggests that housing dollars will go further in Jefferson County than in Dane or Waukesha. People who live and work in those counties may move into Jefferson County fully intending to hold on to their jobs.

	Jefferson Co. residents commuting to listed county	Residents of listed county commuting into Jefferson Co.	Net gain or loss of workers
Waukesha Co. WI	5,407	1,410	-3,997
Dane Co. WI	3,971	1,901	-2,070
Walworth Co. WI	1,830	1,087	-743
Dodge Co. WI	1,491	4,021	2,530
Milwaukee Co. WI	1,281	483	-798
Rock Co. WI	734	1,262	528
Washington Co. WI	152	115	-37
Racine Co. WI	100	72	-28
Columbia Co. WI	53	211	158
Kenosha Co. WI	52	16	-36
Elsewhere	429	692	263

## Median home values



Source: US Dept. of Commerce, Census 2000, County-to-county worker-flow files

Census 2000, Summary File 3, QT-H14

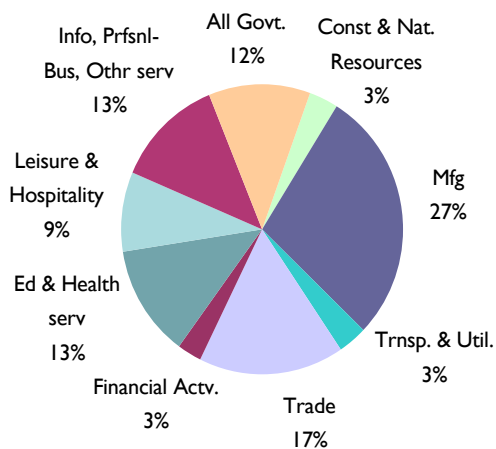


## Industry Employment -

### Introducing NAICS (North American Industry Classification System)

From the 1930s to 2002, some version of the Standard Industrial Classification (SIC) system defined categories for employment-by-industry estimates. Beginning in 2003, the North American Industry Classification System replaces SIC. The table below lists each system's major categories. A quick glance shows that NAICS offers categories for which data was previously unavailable (like leisure & hospitality or education & health services) and that NAICS offers less detail in other places (retail trade and wholesale trade collapse to one category for non-metropolitan areas).

#### Jefferson County Industry Distribution: 2002



The table below hides one wrinkle that may be the most important aspect of SIC-to-NAICS conversion. **Even if a category carries an identical title, like “manufacturing”, its definition changed, so meaningful comparisons of SIC data to NAICS are very limited.** The SIC definition of manufacturing included establishments that now reside in the services category. Elements of printing are now in information services; some establishments providing professional, technical, administrative or support services may have moved from manufacturing into services. These are just a few examples of changes that limit detailed, direct comparisons of historical SIC data to current NAICS data. (Also, NAICS data was revised with newly available information; while SIC was not, due to its discontinuation.)

Under SIC, restaurants and bars were under retail trade, while NAICS puts them in the newly-created leisure & hospitality sector. Other establishments in the leisure & hospitality sector (such as hotels and lodging facilities) came from the services sector of SIC. There is no accurate or reliable way to compare the old trade or services numbers to the new ones.

Despite recent years' setbacks, Jefferson County's manufacturing sector continues to be a key component of the local economy. So does retail & wholesale trade, which is driven by retail establishments clustered around the interstate highway.

#### 2002 Industry Employment in Jefferson County: A comparison of two classification systems

NAICS Super-sectors	Employment	Distribution	SIC Industry Divisions	Distribution
Construction, natural resources & mining	1,218	3%	Construction & Mining	3%
Manufacturing	10,166	28%	Manufacturing	31%
Transportation, warehousing & utilities	1,233	3%	Transportation, utilities & communication	4%
Trade (wholesale & retail)	6,040	17%	Wholesale trade	4%
			Retail trade	20%
Financial activities	931	3%	Finance, insurance & real estate	2%
Information, professional & business services, other services	4,558	13%	Services & misc (incl. agr, forestry, fishing)	26%
Education and health services	4,581	13%	Government	11%
Leisure & hospitality	3,142	9%		
Government	4,183	12%		

Source: WI DWD, Bureau of Workforce Information, Current Employment Statistics Program, March 2003

## Jefferson County Workforce Profile

Listed in the table at the middle of the page, the 10 largest employers in Jefferson County accounted for roughly 17 percent of payroll jobs reported in the county in the first quarter of 2003. Employers' figures vary from month to month and seasonality differs significantly from employer to employer. For these and other reasons, specific ranks are not necessarily consistent or telling.

Listed in the top table, the ten largest industry groups provided approximately 42 percent of the county's reported jobs. At this writing, food manufacturing continues to be troubled by a labor dispute.

### Top 10 Industry Groups in Jefferson County

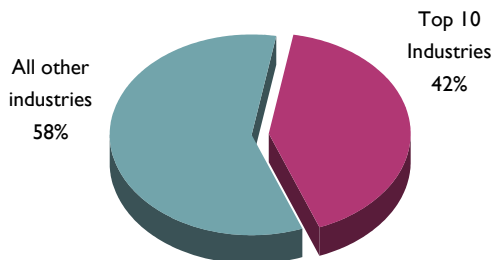
Industry Group	March 2003		Numeric change 2002 - 2003
	Employers	Employees	
Educational Services	14	2,317	0
Food Services and Drinking Places	135	2,125	-16
Food Manufacturing	20	1,778	-548
Nursing and Residential Care Facilities	20	1,723	12
Administrative and Support Services	66	1,505	442
Fabricated Metal Product Manufacturing	26	1,334	-11
Executive, Legislative, & Gen Government	23	1,236	0
Transportation Equipment Manufacturing	*	*	*
General Merchandise Stores	*	*	*
Printing and Related Support Activities	12	948	6

\*data suppressed to maintain confidentiality

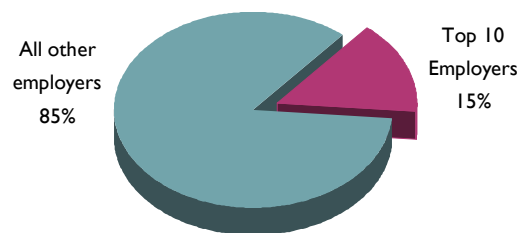
### Top 10 Private Employers in Jefferson County

Company	Product or Service	Size
Trek Bicycle Corporation	Bicycle design, manufacturing and sales.	500-999
Perry Judd's, Inc.	Prepress, press, bindery, list services & distribution	500-999
Bethesda Lutheran Homes & Services	Facilities & services for elderly/disabled; religious ed.	500-999
Fort Atkinson Memorial Health	Hospital and clinics	500-999
Wal-Mart	Discount department stores	250-499
Aristotle Corp.	All other plastics product manufacturing	250-499
St. Coletta of Wisconsin, Inc.	Residential, voc. & pastoral svc for seniors & disabled	250-499
Spacesaver Corp.	Manufacturer of shelving & storage systems	250-499
Redsco, Inc. Gen Ptr	Meat processed from carcasses	250-499
Terra Staffing Services, Inc.	Staffing agency	250-499

Share of jobs with top 10 industries



Share of jobs with top 10 employers



Source: WI DWD, Bureau of Workforce Information, ES-202 special report, First quarter, 2003



## Jefferson County Workforce Profile

Overall, Jefferson County's employers reported paying wages somewhat below the statewide averages. Despite recent difficulties, manufacturing remains a critical breadwinner for the county. Compared to other sectors it provided the most jobs (\$10,292), the most total wages and the highest average annual wage per worker (\$35,905). If the lower-paid manufacturing workers were out of work more often than the higher-paid workers, it would be possible to see average wage per worker rise without any individual worker seeing a pay increase. Education & health services wages (\$30,038) are higher than the county's all-industries average wage (\$27,825) and reasonably close to the statewide average wage for education & health services (\$33,768). Job losses in this sector are all the more unfortunate for these reasons.

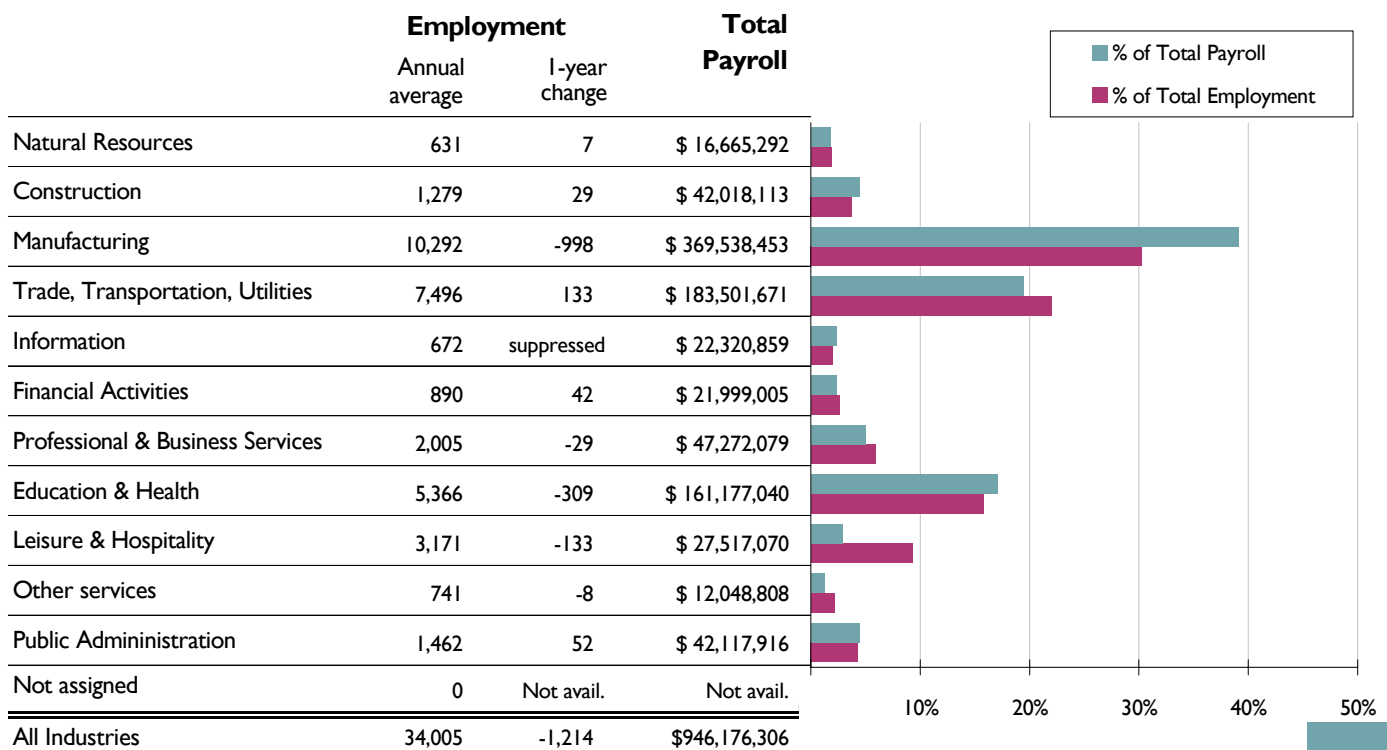
### Average Annual Wage by Industry Division in 2002

	Average Annual Wage Wisconsin	Average Annual Wage Jefferson County	Percent of Wisconsin	1-year % change
All Industries	\$ 32,422	\$ 27,825	86%	2.1%
Natural resources	\$ 25,481	\$ 26,411	104%	3.4%
Construction	\$ 39,649	\$ 32,852	83%	-2.7%
Manufacturing	\$ 40,584	\$ 35,905	88%	3.0%
Trade, Transportation, Utilities	\$ 28,422	\$ 24,480	86%	2.6%
Information	\$ 38,871	\$ 33,216	85%	Not avail.
Financial activities	\$ 40,337	\$ 24,718	61%	2.4%
Professional & Business Services	\$ 36,324	\$ 23,577	65%	-0.4%
Education & Health	\$ 33,768	\$ 30,037	89%	5.3%
Leisure & Hospitality	\$ 11,837	\$ 8,678	73%	2.9%
Other services	\$ 19,500	\$ 16,260	83%	4.0%
Public Administration	\$ 33,769	\$ 28,808	85%	0.5%

Source: WI DWD, Bureau of Workforce Information, Covered Employment & Wages, August 2003

Of the 7,496 jobs in trade, transportation and utilities, 4,807 or 64 percent are in the retail trade, segment where the average wage is closer to \$19,781. Though smaller, other segments of this sector reported higher wages, such as utilities (\$53,775) and wholesale trade (\$31,418).

### 2002 Employment and Wage Distribution by Industry in Jefferson County



Source: WI DWD, Bureau of Workforce Information, Covered Employment and Wages, August 2003

## Per Capita Personal Income

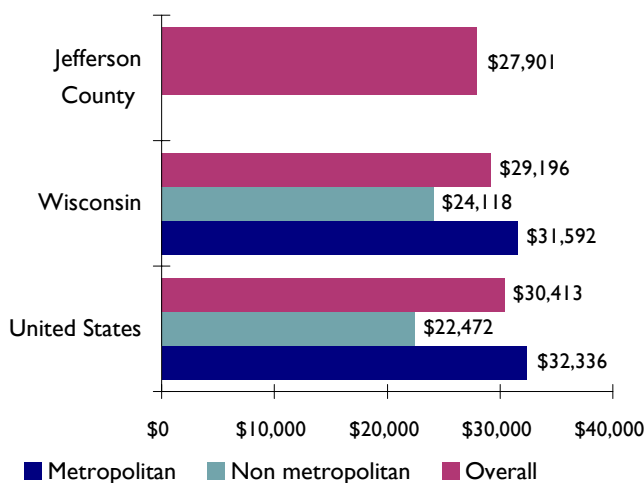
In 2001, Jefferson County's per capita personal income (PCPI) of \$27,901 was above non-metropolitan Wisconsin's PCPI (\$24,118) and above the national non-metropolitan PCPI (\$22,472). Between 1996 and 2001, Jefferson County's PCPI climbed from 10.9 percent above non-metropolitan Wisconsin's PCPI to 17.7 percent above non-metropolitan Wisconsin's PCPI. Meanwhile, Jefferson County's PCPI climbed from 16.8 percent above the national non-metropolitan PCPI to being 24.2 percent above the national non-metropolitan PCPI).

Growth in PCPI relates to demographic shifts (see pages 2 and 3). As a greater share of the population enters retirement, more residents rely on transfer payments (such as Social Security) and fewer have net earnings (typically associated with employment). Transfer payments grow much more slowly than net earnings. Households with substantial investment income (dividends, interest or rent, including retirement or pension plans) are more likely to consider warmer climates for retirement, so PCPI growth may slow considerably.

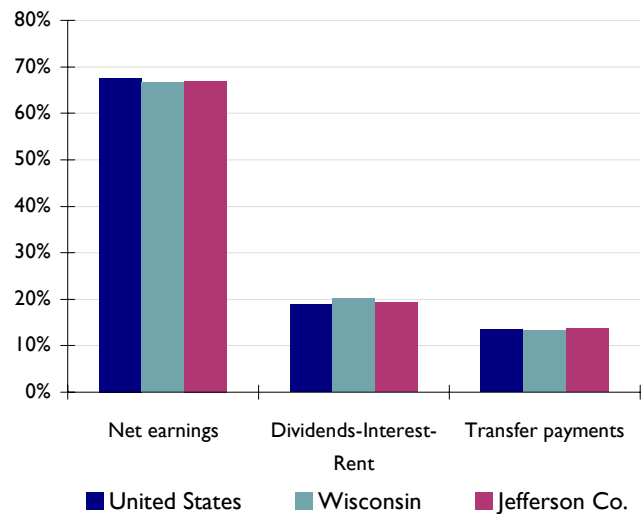
**Per Capita Personal Income**

	1996	1997	1998	1999	2000	2001	Percent Change	
							1 year	5 year
United States	\$24,270	\$25,412	\$26,893	\$27,880	\$29,760	\$30,413	2.2%	25.3%
Wisconsin	\$23,301	\$24,481	\$26,004	\$26,926	\$28,389	\$29,196	2.8%	25.3%
Jefferson County	\$21,286	\$22,679	\$24,297	\$25,549	\$26,933	\$27,901	3.6%	31.1%

**2001 PCPI**



**Components of Total Personal Income: 2001**



Source: US Dept. of Commerce, Bureau of Economic Analysis, State & Local Personal Income, May 2003, CAI-3, CA05

### WWW addresses of source data

Wisconsin population estimates and projections:

<http://www.doa.state.wi.us/dir/index.asp>

Education levels of population, labor force participation rates, commuting patterns:

<http://www.census.gov/main/www/cen2000.html>

Labor force estimates (employed and unemployed), industry employment, average annual wages:

<http://www.dwd.state.wi.us/lmi/>

Occupations in-demand:

[http://www.dwd.state.wi.us/lmi/wda\\_map.htm](http://www.dwd.state.wi.us/lmi/wda_map.htm)

Per Capita Personal Income:

<http://www.bea.gov/bea/regional/reis>

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